

## **Insurance Exchange**

Approach the Health Information Exchange project in two major phases:

**Study Phase** – takes 40 to 60% of the total project time line

1. Establish study team – Designate executive sponsor(s), empower study phase project manager, recruit needed experts - may be outside consultants &/or state employees
2. Determine budget of study phase – primary cost will be personnel
3. Determine due date of team's recommendations
4. Project manager puts together a high level plan for the study phase
5. Identify all business requirements/must haves – legal, business, technical, etc.
6. Explore all opportunities/value adds (ex: limit scope to information exchange or build architecture that 2014 requirements will fit into?). Determine their cost/benefit and priority
7. Identify risks and associated mitigation strategies
8. Research and estimate cost of options being considered
9. Describe vision of end product and its cost
10. Layout the high level implementation plan
11. Layout a high level test plan
12. Layout a high level introduction (marketing/PR, training, pilot, etc.) plan
13. Determine needed resources
14. Document recommendations including a high level plan for implementation phase
15. Obtain approval from executive sponsors and other decision makers to proceed

## **Implementation Phase**

1. Establish team with needed resources. Confirm commitment of executive sponsor , project manager and all needed team members.
2. Develop detailed implementation plan – tasks, effort estimates, start and end dates of tasks, resource assignments, identify sequential and concurrent activities
3. Project manager monitors implementation of plan and adjusts plan as needed.

## **Post-Implementation Phase**

1. Ensure needed documentation of the end product is written and available to those who will perform on-going maintenance.
2. Ensure follow through on any future development plans.

## **Things to Consider**

1. Consider a development strategy that creates a product that could be sold to other states (that creates jobs for Iowans. If this strategy is pursued the study phase will have to identify bidder qualifications and qualified bidders, issue an RFP and select a winning bidder.
1. Consider assessing alternative on-going funding models.
2. The project manager should be state paid and the team should include some state employees.
3. Select an Executive Sponsor(s) from Iowa's state executives who will hold the team accountable and who have the power to make quick changes in resources (money, people, access, etc.) in support of the project team.
4. Adjust team members as appropriate during both phases of the project.